

January 15, 2024

Missió de Benchmarking 2024

Los Angeles & Las Vegas



Planificació 2024

Formació i sensibilització

- Canals digitals: International eTrade
- Contractació pública internacional
- Seminari Focus: Oportunitats de mercats

Accions agrupades

Missió de prospecció comercial a EEUU:

- Los Angeles
- Las Vegas (NAB Show)

Fer negocis a Amsterdam:

- Fira IBC

Fira ISE

Delegacions internacionals

- EU Latin American AV Summit
- Participar a l'estand del clúster

Open Innovation Challenge

- Identificar oportunitats

Accions individuals

- Consultes sobre els mercats i projectes individuals per la internacionalització
- Projectes europeus (Clúster, individual)
- Cupons a la internacionalització: Diagnosi internacional
- Ajut a la creació de noves filials

Planificació escenaris 2025-2026

Formació i sensibilització

- Canals digitals: International eTrade
- Contractació pública internacional
- Seminari de barreres a la internacionalització
- Seminari Focus: Oportunitats de Mercats

Accions agrupades

Estudi de mercat Àsia:

- Xina, Corea, Japó

Missió de prospecció comercial:

- Canadà o UK, Benchmarking ecosistemes

Fira ISE

Delegacions internacionals:

- Portar delegació dels Nòrdics
- Participar a l'estand del Clúster

Open Innovation Challenge:

- Identificar oportunitats

Accions agrupades

Anàlisi dels mercats:

- Middle East (Emirates, Aràbia Saudita)
- Austràlia

Missió de prospecció comercial:

- Mèxic, Argentina, Brasil, Benchmarking ecosistemes

Fira ISE

Delegacions internacionals:

- Portar delegació "mercat x"
- Participar a l'estand del Clúster

Open Innovation Challenge:

- Identificar oportunitats





El Clúster Audiovisual de Catalunya integra les principals empreses i institucions, de dimensions diverses, que abasten tota la xarxa de valor del sector audiovisual, actuant com a columna vertebral de la indústria audiovisual catalana.


Grans dades

 **185** empreses
sòcies


Clúster audiovisual més gran en empreses d'Europa

 **12** segments de la
cadena de valor


 **10** grups
de treball


 **225** projectes de talent
impulsats de 35
universitats d'11 països


 **+300**
esdeveniments
organitzats

 **1.200** entrevistes
de feina per
incorporar talent


Objectius Estratègics


 Ser referents en
Transformació
Tecnològica Audiovisual

 Dinamitzar i generar
oportunitats entre els
agent del sector i el talent

 Connectar i
posicionar-nos
Internacional

 Atraure
inversions
exterioris

 Ser agents actius
influentis
d'infraestructures
audiovisuales

 Empoderar i incrementar
la presència i el valor de
les empreses catalanes

MEMBRES DE TOTA LA XARXA DE VALOR

El nostre clúster està format per empreses de totes les seccions de la xarxa de valor audiovisual



US Economy Snapshot

1st

World economy
(GDP)

+20.7%

Exports increase
CAT to the US (2022)

8

Ease of
Doing Business

3rd

Population

+2.6%

GDP growth
2023



California Media & Entertainment Industry

California's entertainment and digital media industry is centered in **Los Angeles**.

It presents opportunities for Catalan businesses involved in **film production, animation, digital media or visual effects**.



Innovative companies specializing in **VR, AR** or **advanced post-production** techniques may find collaborations with Californian businesses.

There is potential for **distributing European audiovisual content** and seeking collaborations with American producers and studios.

Film and AV industry festivals:

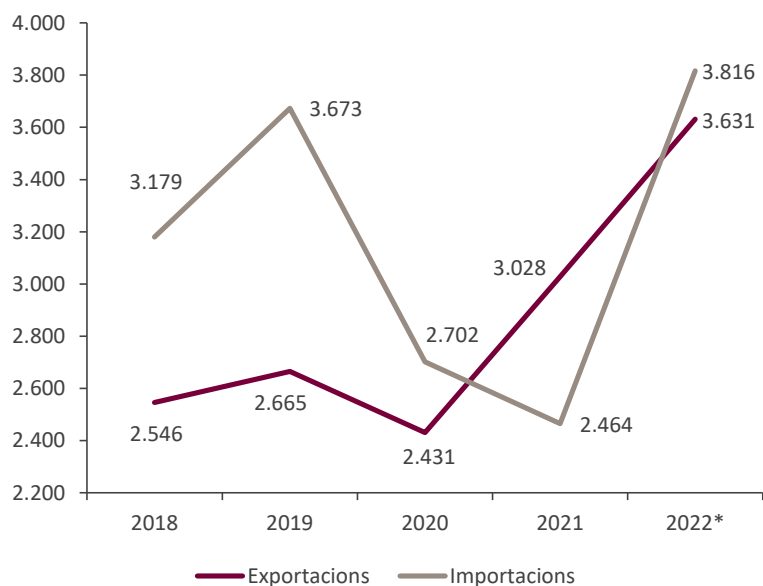


(nearby in Las Vegas)



Fem avui l'**empresa** del demà

Commercial relations Catalonia - US



Note: Data in M€

*Provisional data

Source: ACCIÓ with data from ICEX



3,197 regular exporting companies to the US

	Exports	Imports
Variation rate 2021/2022	20.7%	55.3%
Principals products (pes s/total exportat/importat al país en %)	Machinery (12.3%) Perfumery & cosmetics (8.9%) Plastics (7.5%)	Pharma prod. (21.8%) Fuels (17.8%) Measuring & Medical devices (9.7%)
Catalan exports/imports to the country as a percentage of total exports/imports for Catalonia (in %)	3.8%	3.4%
Catalan exports/imports to the country as a percentage of total exports/imports for Catalonia (in %)	19.2%	11.3%

California Media & Entertainment Industry

**LA FILM & TV
BY THE NUMBERS**

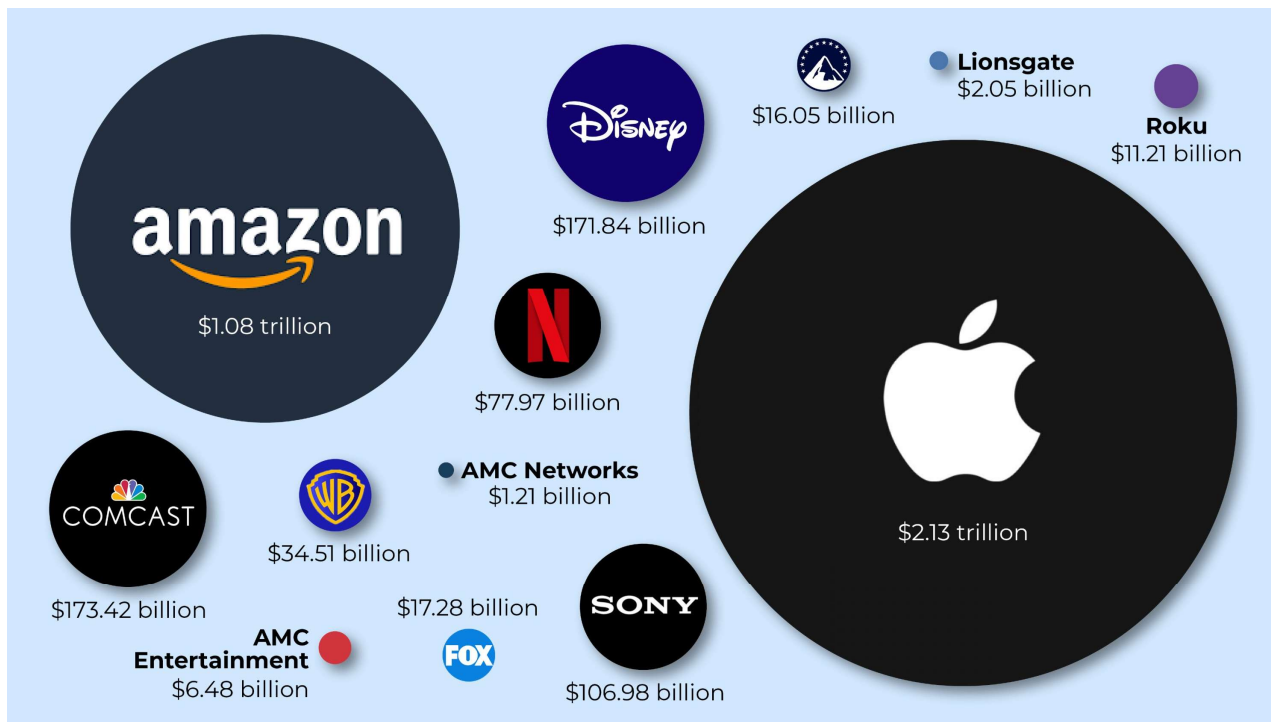
FILM INDUSTRY ESTABLISHMENTS

1:6 For every one Starbucks coffee location in Greater Los Angeles, there are six film industry establishments.

330+ There are more than 330 purpose-built sound stages...

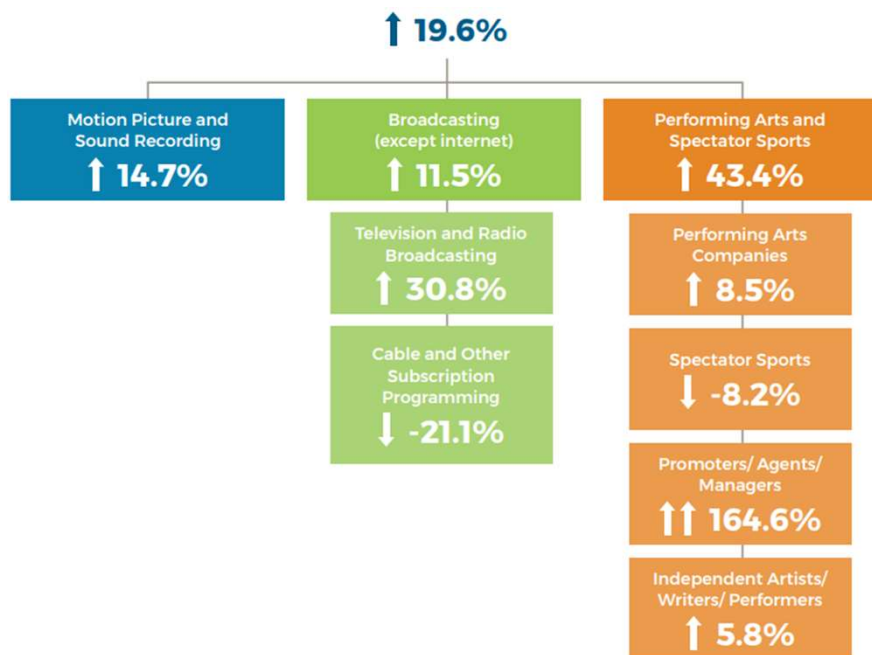
5.3M+ ...with more than 5.3 million square feet of total production space.

That is more production space than is known to be available in New York, Vancouver, Toronto and Louisiana combined.

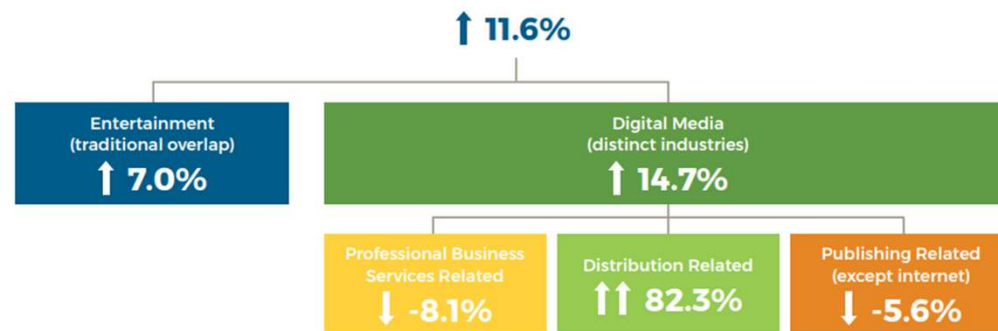


California Media & Entertainment Industry

Change in employment in the Entertainment industry



Change in employment in the Digital Media industry



The state of Audiovisual Technologies in the US

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1) Video Streaming

Consumers in the US and abroad are still willing to spend more on streaming.

2) Social Media

People aren't sold on the industry's new trends, like subscriptions and decentralization.

3) Generative AI

Consumers still value human touch when it comes to content production.

4) Video Games and the Metaverse

The persistent appeal of games shows why it's not time to give up on the metaverse.

5) Digital Audio

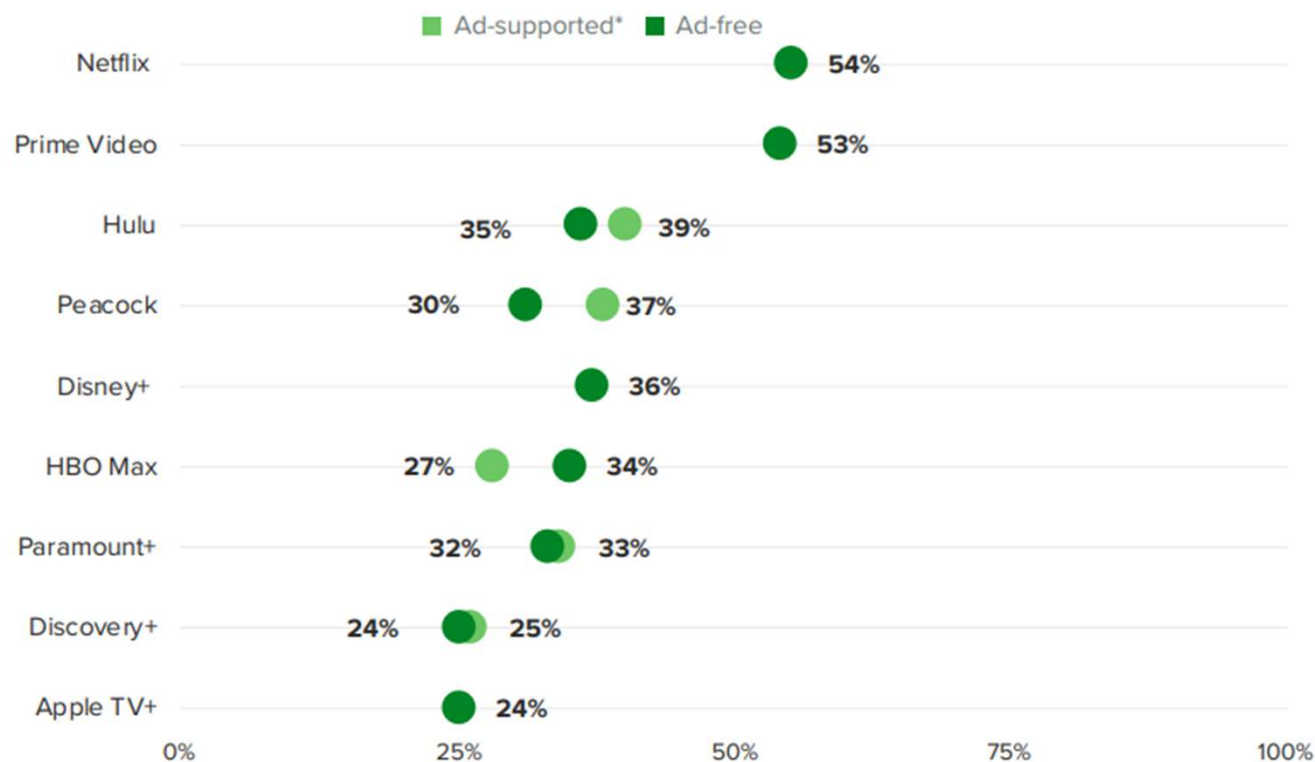
Video and AI-generated content are finding more ways to populate audio streamers.

The state of Audiovisual Technologies in the US

1) Video Streaming

Ads:
streamers still
have many
consumers to
win over

Share of U.S. adults who said in April 2023 that they used each at least once in the past month:

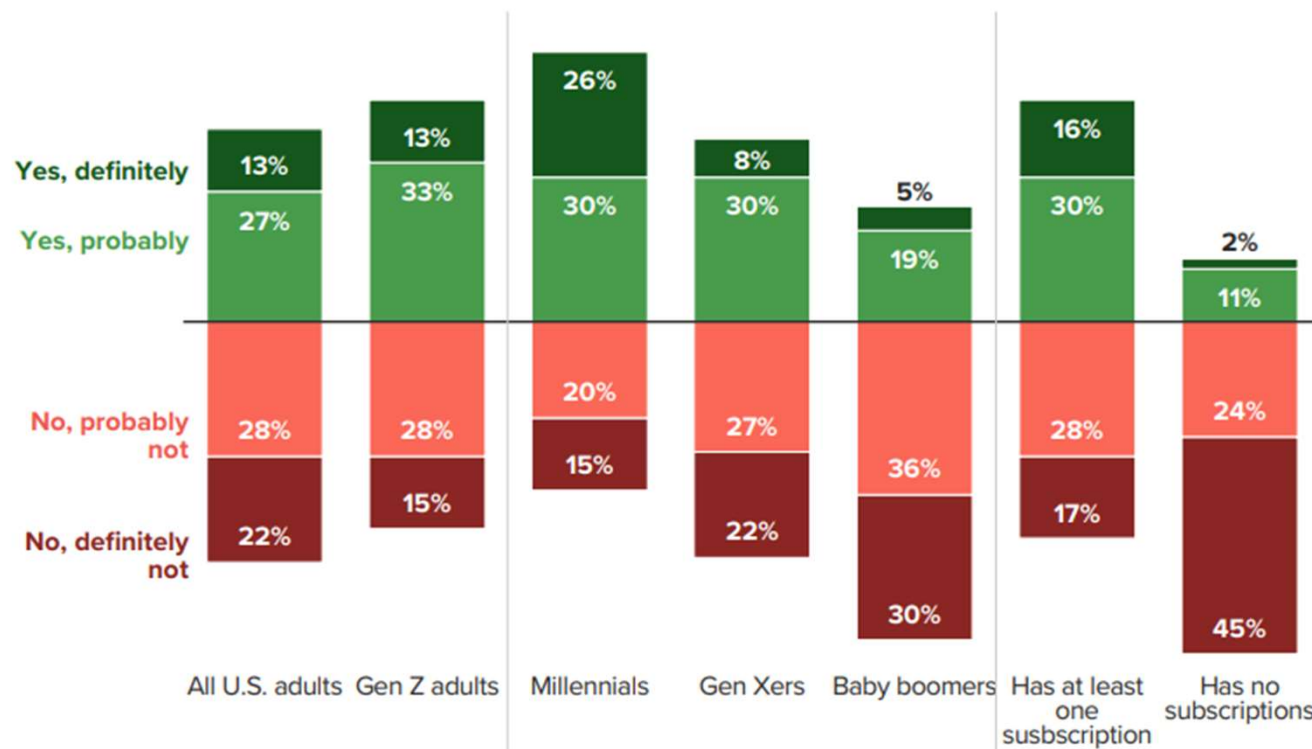


The state of Audiovisual Technologies in the US

1) Video Streaming

The importance of building franchises

Shares who said whether they'd be willing to pay more for a video streaming service that regularly released content based on well-known franchises



The state of Audiovisual Technologies in the US

1) Video Streaming



Develop Gen Z-targeted strategies. Getting this group to pay for streaming via programs like college student discounts could help streamers with fledgling ad tiers capitalize on a relatively undermonetized cohort.



Emphasize content that can be localized in various regions. With boosting profitability and growing internationally as key goals, streamers need to invest in content that has the potential to spawn foreign-language editions.



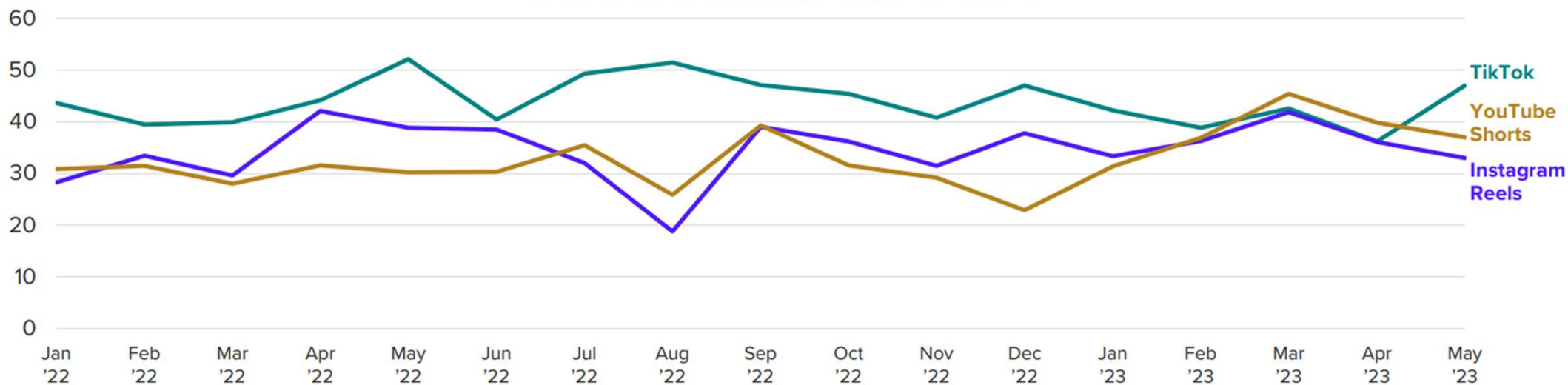
Sports won't be the cure-all that some streamers hope for. While live sports broadcasts help platforms easily differentiate, streamers should know that Gen Zers are less likely than adults overall to be sports fans.

The state of Audiovisual Technologies in the US

2) Social Media

YouTube Shorts is a credible TikTok challenger, but **monetization** remains a broad issue

Net favorability of each platform among Gen Z adults:

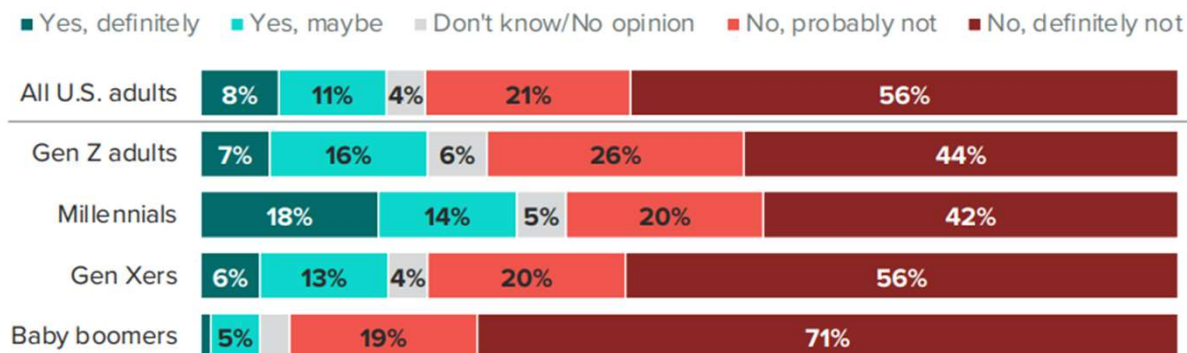


The state of Audiovisual Technologies in the US

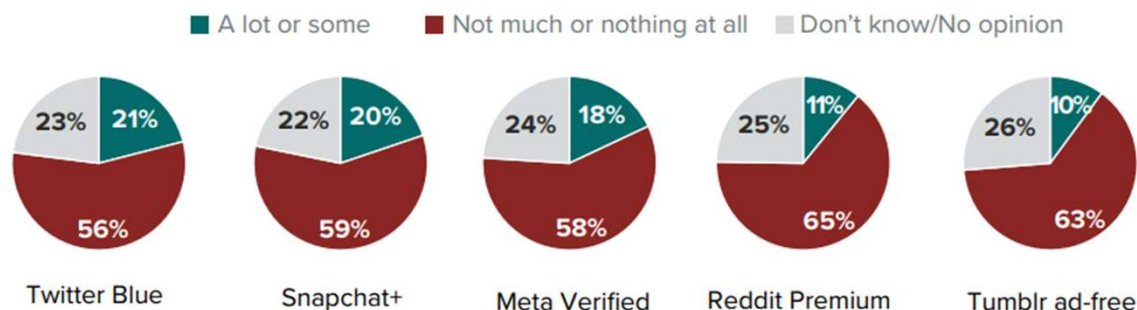
2) Social Media

Paid social media is a mini trend, and will stay that way

Shares of U.S. adults who said whether they would pay to use a social media platform:



Share of U.S. adults who, when asked about the following, said they had heard ...



Source: Morning Consult Research Intelligence

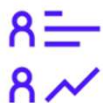
Fem avui l'empresa del demà

The state of Audiovisual Technologies in the US

2) Social Media



Emphasis on short-form video distribution remains key. But companies can't afford to ignore TikTok copycats Instagram Reels and YouTube Shorts, given that Gen Zers increasingly favor those products.



The decentralized hype will stay among the most tech savvy. Places like Mastodon won't warrant media brand investment for a while, since many consumers still need to be educated on what decentralized social media is.



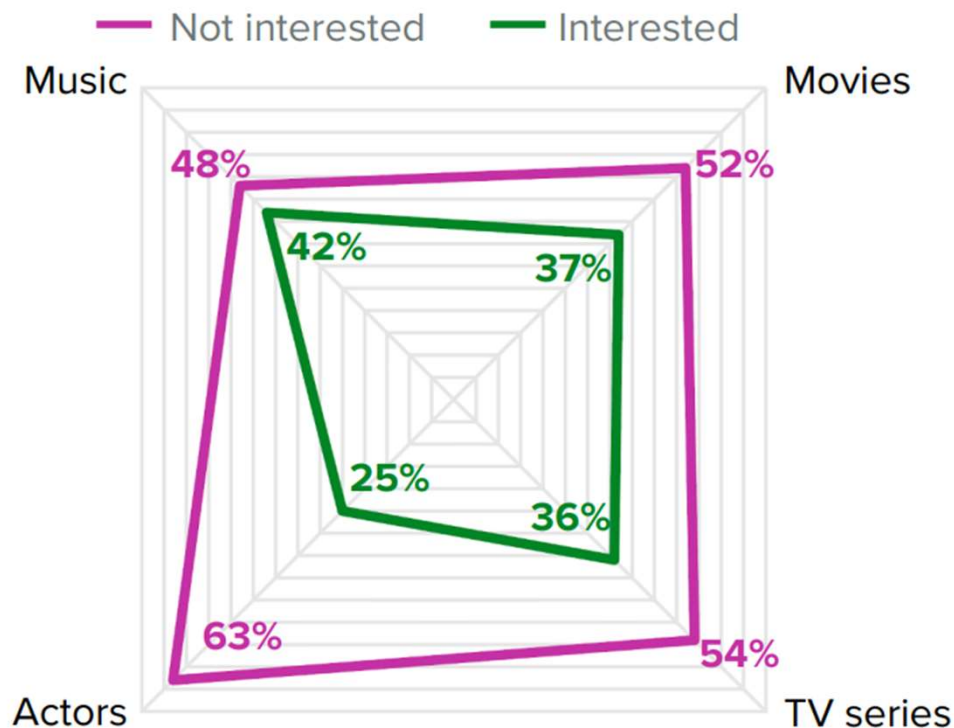
Social media subscriptions face an uphill battle. Willingness to pay for social media will remain limited for the same reasons that many [don't want](#) to pay for podcasts — the most compelling content in the space is available for free.

The state of Audiovisual Technologies in the US

3) Generative AI

There's some interest in AI-generated media, but it's mostly just viewed as a **novelty**

Share of adults in April who said they are interested in the following things generated by AI:

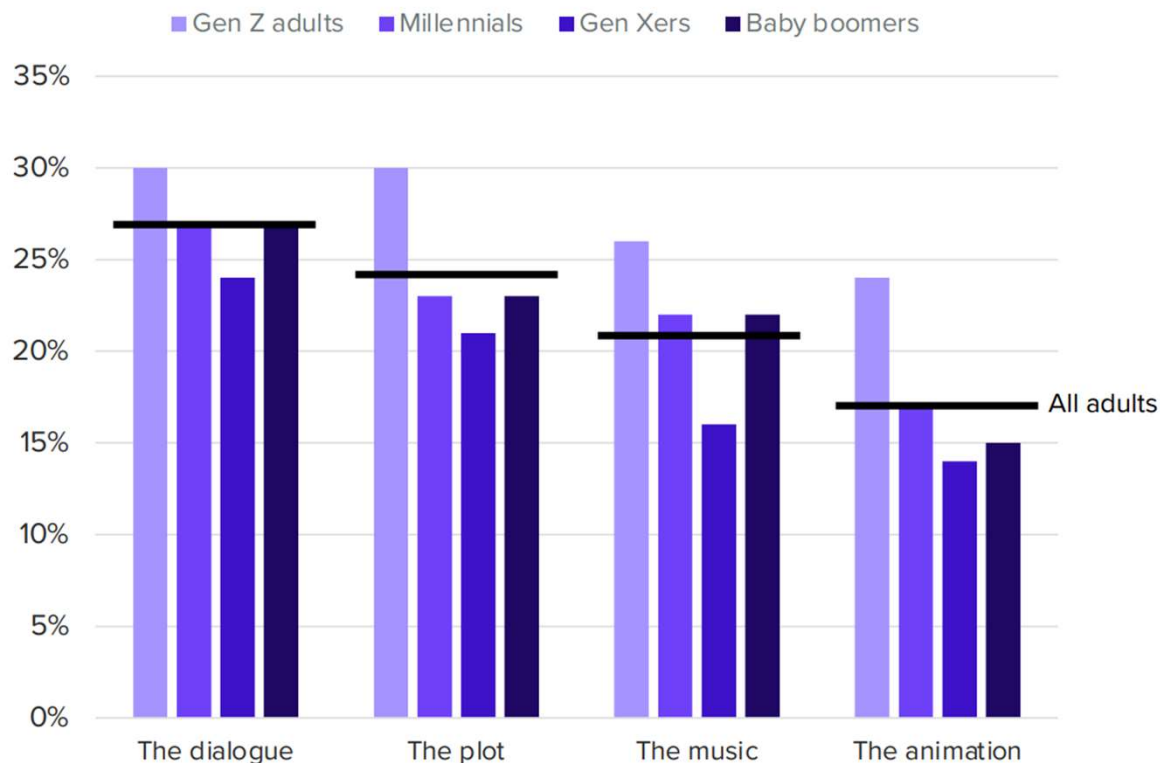


The state of Audiovisual Technologies in the US

3) Generative AI

AI is more likely to **damage** certain aspects of content **quality**

Shares of respondents who said use of AI in film and TV production would make the following worse:



Source: Morning Consult Research Intelligence

Fem avui l'empresa del demà

The state of Audiovisual Technologies in the US

3) Generative AI

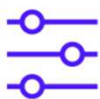


It's too early to think of wholly AI-generated content as a revenue stream.

Many aren't thinking about how AI can improve entertainment; most show little interest in movies, TV series and actors created with generative AI.



Studios should be mindful of how they promote their use of AI. About a quarter of consumers think generative AI harms dialogue and plot, so studios should be clear when their use of the technology didn't affect those areas.



Consumers largely think AI's role in entertainment should be regulated.

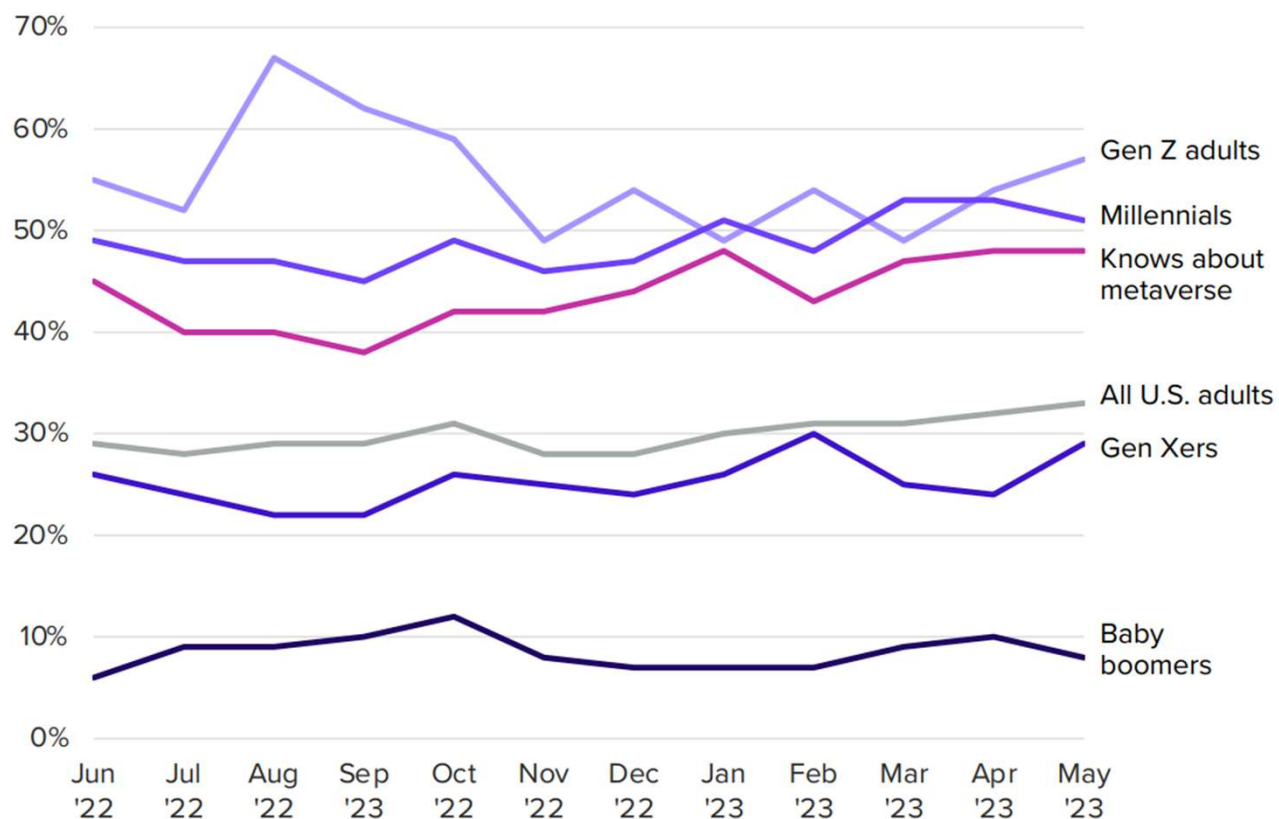
While the topic is still new, studios must become leaders in communicating to public policy officials any projects that wouldn't have been possible without AI.

The state of Audiovisual Technologies in the US

4) Video Games and the Metaverse

Console sales and **Hollywood adaptations** are expanding the gamer base

Shares of respondents who said they consider themselves gamers



Source: Morning Consult Research Intelligence

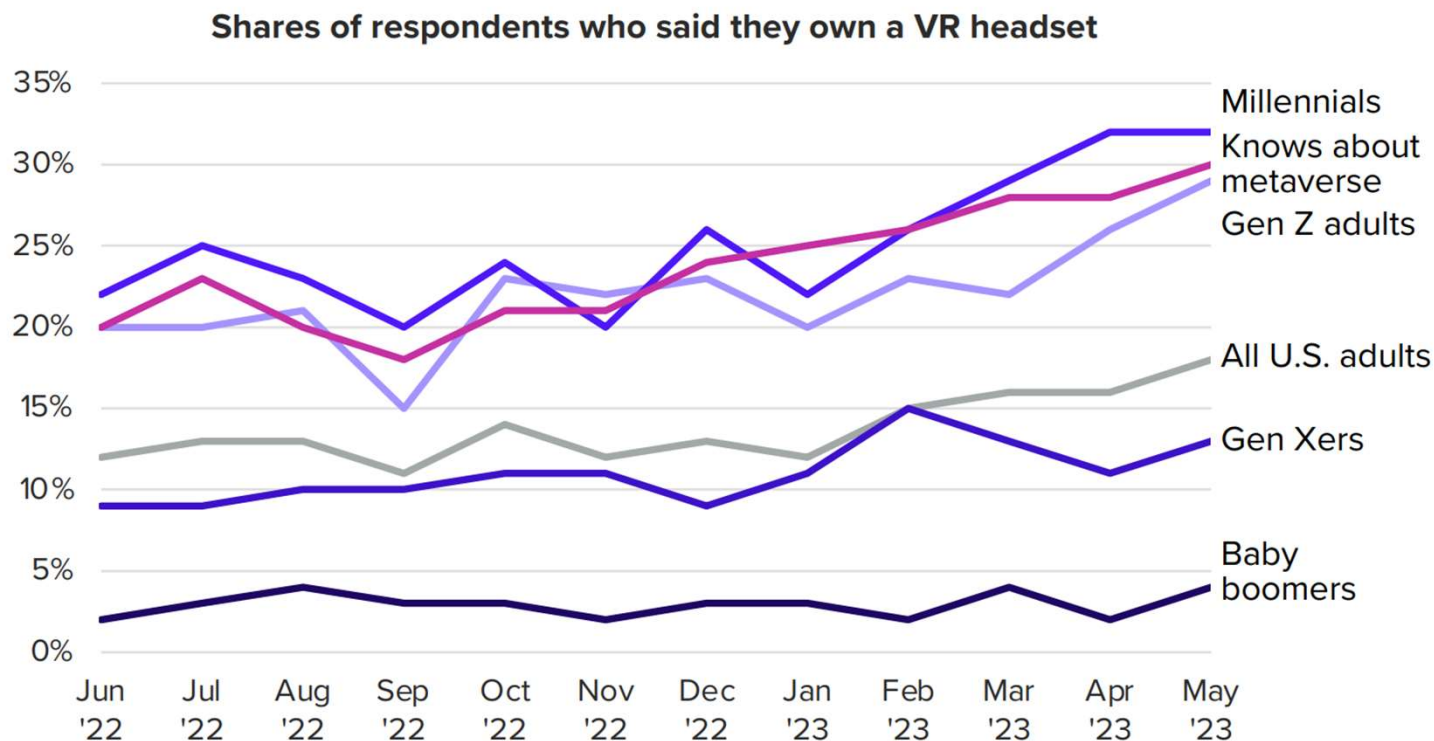
Fem avui l'empresa del demà

The state of Audiovisual Technologies in the US

4) Video Games and the Metaverse

VR headset ownership heats up among millennials

Overall penetration remains modest



The state of Audiovisual Technologies in the US

4) Video Games and the Metaverse



The gamer base continues to grow. With next-generation consoles like PS5s becoming more widely available, more consumers will identify as gamers and be receptive to Hollywood's game adaptations.



The case for metaverse activations is growing. More young adults will continue to use Roblox and Fortnite, which is now an Olympic esport, thanks to new content enabled by generative AI.



But VR-specific initiatives remain a lower priority. Streamers becoming available on VR helps them reach higher-income consumers, but most people aren't thinking about watching content through these headsets.

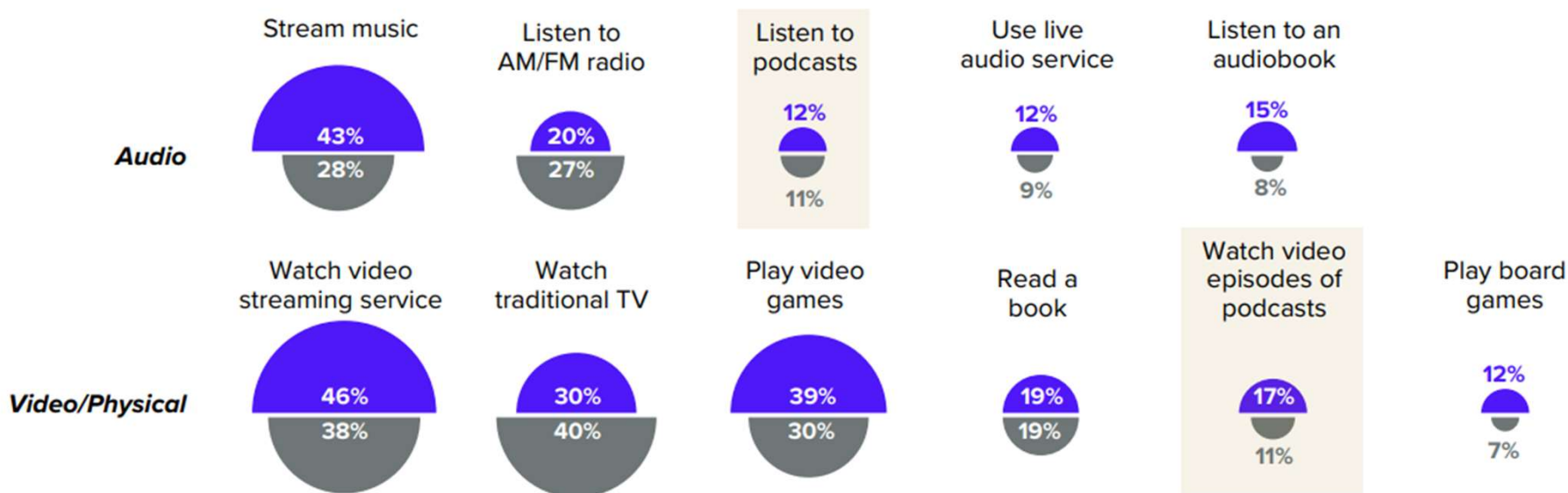
The state of Audiovisual Technologies in the US

5) Digital Audio

Gen Z's **video podcast** consumption suggests fewer shows will remain audio-only

Shares who said in May 2023 they did each of the following daily in the past month:

■ Gen Z adults ■ All U.S. adults

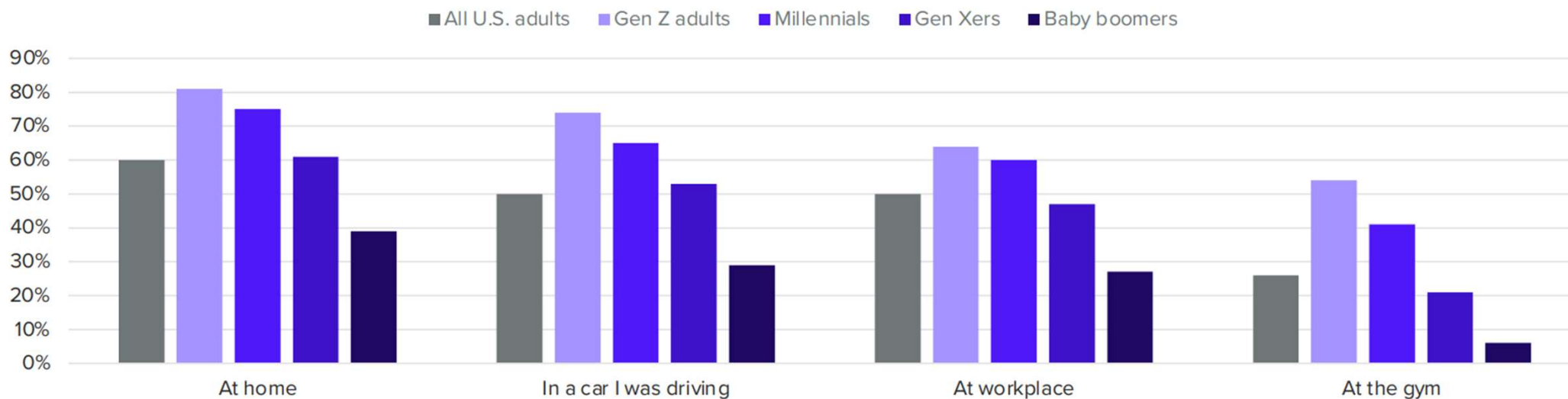


The state of Audiovisual Technologies in the US

5) Digital Audio

Where Gen Z stream their music illustrates the importance of **audio ads**

Respondents in April 2023 who said they had streamed music in the following places at least once a week in the past month:



The state of Audiovisual Technologies in the US

5) Digital Audio



Invest more in video podcasts, but surefire hits aren't guaranteed. Video podcast consumption is substantial, but shows on YouTube that don't showcase the hosts speaking on camera will have a tougher time taking off.



Consider how video streamers could boost AI initiatives. Music streamers could license the voices of popular actors from recently debuting streaming series to voice AI-powered assistants like Spotify's AI DJ, for example.



At the end of the day, for music streamers, it's still all about the basics. More than anything, consumers cite music stream quality and selection of musicians as top priorities when choosing between music streamers to use.

NAB Show (Las Vegas, April 14-17, 2024)

NAB Show covers the **entire content lifecycle** — creation through consumption — through four curated destinations:

- **CREATE:** All things pre-production to post
- **CONNECT:** All things distribution and delivery
- **CAPITALIZE:** All things reach and ROI
- **INTELLIGENT CONTENT:** All things data, AI and automation

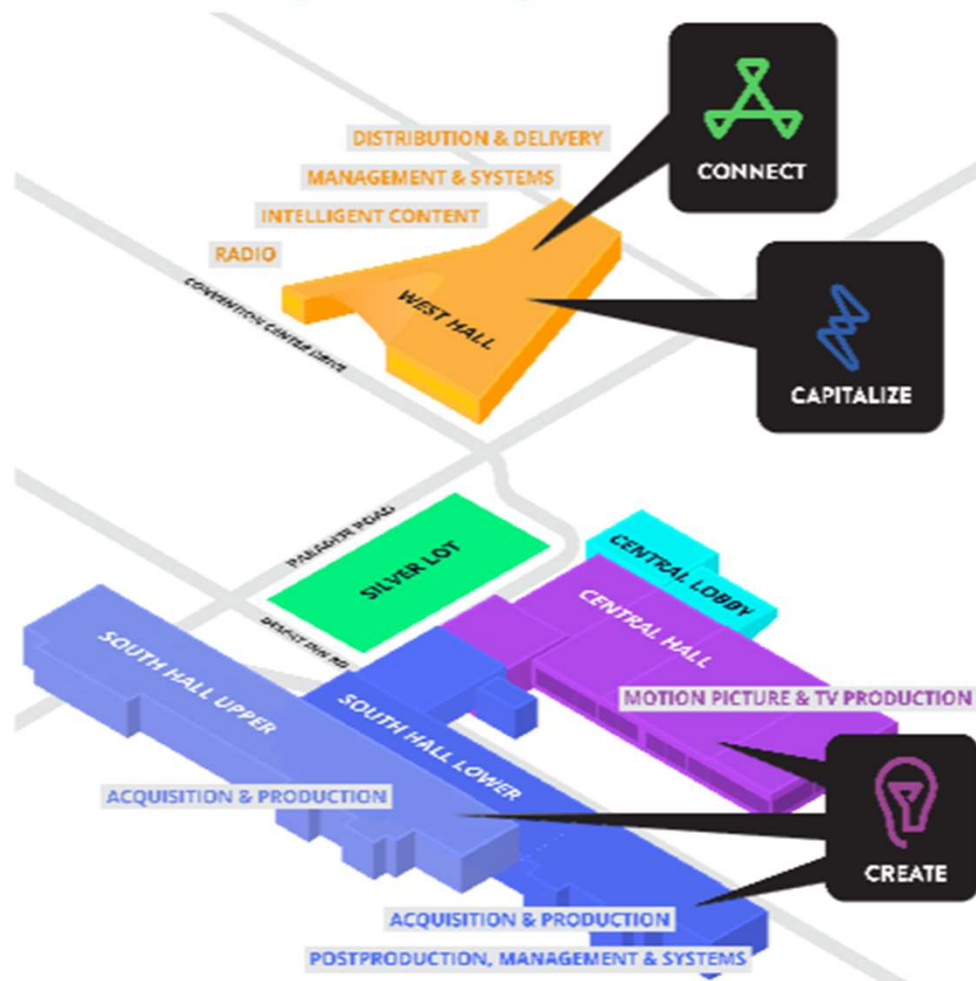
Exhibit Hall Hours

Sunday, April 14 | 10 a.m. – 6p.m.

Monday, April 15 | 9 a.m. – 6 p.m.

Tuesday, April 16 | 9 a.m. – 6 p.m.

Wednesday, April 17 | 9 a.m. – 2 p.m.



NAB Show (Las Vegas, April 14-17, 2024)

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2023 FIGURES

- TOTAL REGISTERED ATTENDEES: 65,013
- INTERNATIONAL ATTENDEES: 17,446
- COUNTRIES REPRESENTED: 166
- TOTAL EXHIBITING COMPANIES: 1,208

2024 LIST OF EXHIBITORS

<https://nab24.mapyourshow.com/80/explorer/exhibitor-gallery.cfm>



Preparació del viatge

Los Angeles &
Las Vegas



Agenda proposada

Time	Wed, Apr 10	Thu, Apr 11	Fri, Apr 12	Sat, Apr 13	Sun, Apr 14	Mon, Apr 15
9:00 AM	Proto Hologram	Sony Pictures Entertainment	Amazon Studios / The Culver Studios	Morning off in Los Angeles (Hollywood, Beverly Hills, Santa Monica...)	NAB Show 2024 attendance	NAB Show 2024 attendance & guided tour
10:00 AM						
11:00 AM	VideoAmp					
12:00 PM	Lunch break	Lunch break	Lunch break			
1:00 PM	Yellow (Snapchat's accelerator)	Entertainment Technology Center (University of Southern California)	The Walt Disney Company	Flight to Las Vegas		
2:00 PM			NEP Group			
3:00 PM					Flight to Barcelona	
4:00 PM						
Location	Los Angeles	Los Angeles	Los Angeles	LA / LV	Las Vegas	Las Vegas

Estimació pressupostària

Concepte (per pax.)	Los Angeles (3,5 dies/4 nits)	Las Vegas (2,5 dies/2 nits)
Hores oficina Acció	240€ (Inclou bonificació del 90%)	
Entrada NAB Show	\$ 169 + taxes per l'Exhibits Pass – Bonificació 62,5% d'ACCIÓ (si es compren abans del 22 març del 2024)	
Allotjament	130 € - 400 € per nit	100 € - 300 € per nit
Menjar	25 € - 80 € per àpat	20 € - 70 € per àpat
Transport	20 € - 60 € per dia	10 € - 50 € per dia
Vols (comptant internacionals i interns entre LA i LV)	800 € - 1.800 €	
Estimació total provisional (aprox. rang més probable)	2.300 € - 3.500 € per pax.	

Com organitzem la missió?

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INSCRIPCIONS D'EMPRESSES

- ✓ Publicació al web d'Acció
- ✓ Convocatòria oberta fins el 15 de febrer
- ✓ Confirmació dels perfils inscrits
- ✓ Places limitades a 15 empreses

AGENDA COMUNA

- ✓ Visites a empreses, centre tecnològic, plató
- ✓ Networking
- ✓ Entrada a Fira NAB Show amb bonificació del 62,5% per entrada

CONDICIONS ECONÒMIQUES

- ✓ Estimació 2.300€-3.500€

Despeses no incloses al contracte

- ✓ Vols i hotel
- ✓ Despeses de manteniment
- ✓ Despeses de desplaçaments

Informació de contacte

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Oficines Exteriors de Comerç i Inversions



Podeu trobar tota la informació de la nostra Xarxa d'Oficines, a:
<https://www.accio.gencat.cat/oficines>

Seu d'ACCIÓ a Barcelona

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Oficines d'ACCIÓ al món

Accra / Amsterdam / Austin / Berlín / Bogotà / Bombai / Brussel·les / Buenos Aires / Casablanca / Ciutat de Mèxic / Copenhaguen / Dubai / Hong Kong / Istanbul / Johannesburg / Lima / Londres / Miami / Milà / Montreal / Moscou / Nairobi / Nova Delhi / Nova York / Panamà / París / Pequín / Santiago de Xile / Sao Paulo / Seül / Silicon Valley / Singapur / Sydney / Stuttgart / Tel Aviv / Tòquio / Varsòvia / Washington DC / Xangai / Zagreb